



MISTAKE OR SURPRISE? – PAVING YOUR CAREER PATH THROUGH THE IG PROFESSION

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December 11, 2018



AGENDA

- How does one come into the records profession?
- What does the “Records to IG” transition look like, from a law firm’s perspective?
- Examples of IG Organizations
- So IG as a Career Path...Mistake or Surprise?
- Path to IG Success

BRIE'S BIO

- Senior Manager of Information Governance Operations – Morgan Lewis and Bockius LLP
- Firmwide Records Senior Manager – Reed Smith LLP
- ARMA – Pittsburgh Chapter President
- Law Firm Information Governance Symposium – Founding Steering Committee Member
- Certified Records Manager
- ~~Excellent singer~~



September 11, 2018 – 2 Sessions

Chapter Sponsor of the Month: *Business Data Records Services (BDRS)*

- Time: 10:00-2:00 – Lunch is provided
 - Location: Best Western Plus Shoreview, 1000 Gramsie Rd, Shoreview
 - Guest Speaker: Melissa Dededer, CRM, IGP, MBA
1. [Session 1: Career Path – Which road to take?](#)
 2. [Session 2: Leadership – What “suit” do you wear?](#)

October 9, 2018 “So You Were Thrown into RIM – Now What? A Panel Presentation

Chapter Sponsor of the Month: *Advanced Records Management (ARM)*

- Time: 11:00-1:30 – Lunch is provided
- Location: Courtyard by Marriott-Roseville, 2905 Centre Point Dr., Roseville
- Guest Speakers: A panel discussion by leading RIM professionals and members of the Chapter.

November 13, 2018 “Steer your Career: Career Identity for Everyday People”

Business Sponsor of the Month: *Redpath and Company*

- Time: 11:00-1:30 – Lunch is provided
- Location: Radisson – Roseville, 2540 N. Cleveland Ave, Roseville
- Guest Speaker: Denise Felder, DeniseMpls Career Services
- Event is approved for ICRM credit.
- [Steer Your Career Presentation](#)

COMING INTO THE RECORDS PROFESSION

My bottles should be categorized under "drinkware," not "baby items."

Can you BELIEVE my mom wanted to get rid of my Rainbow Brite doll before the standard 7 year retention period?

It's obvious that she was BORN to be a Records Manager.



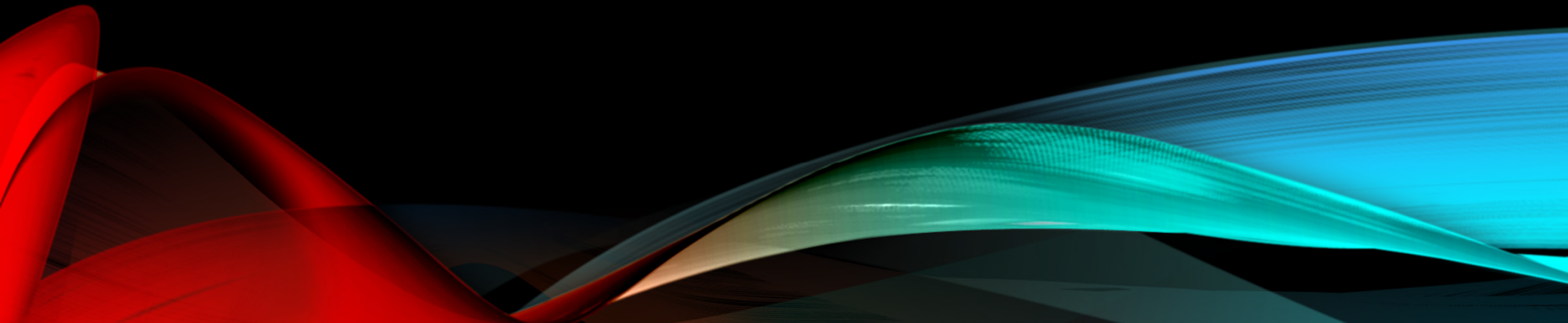
COMING INTO THE RECORDS PROFESSION: THE REALITY

**Look...we can't find anything
and we need help. Can you
manage our records?**



RECORDS TO IG: LAW FIRM PERSPECTIVE*

*though other organizations may find similarities!





THE WORLD OF RECORDS – THE NINETIES

- Taxonomy and Inventory
- Storage/Retrieval
- Retention
 - Blue/pink/yellow/green sheet mania



THE WORLD OF RECORDS - 2000

- Taxonomy
- Retention/Disposition Policy Development
- Storage/Retrieval
- Electronic Records Management
- Scanning Solutions
- Disaster Recovery/Business Continuity



THE WORLD OF ~~RECORDS~~ INFORMATION GOVERNANCE- TODAY

- Electronic records as the official record
- **Information Security**
- Routine disposition programs
- Data analytics
- Knowledge Management (identifying/leveraging data that you have)
- Representation from multiple disciplines
 - IT
 - Security
 - Risk/Compliance
 - Attorneys
 - Knowledge Management



THE WORLD OF INFORMATION GOVERNANCE TODAY

- Having a seat at the table
 - Client RFPs
 - Audit Responses
 - GC discussions
 - C-level interaction
- Reactive v. Proactive
- Initiating change
 - Consultant work



INFORMATION GOVERNANCE ORGANIZATION



IG ORGANIZATION EXAMPLE

Director of Risk and Information Governance

Regional Records and Information Governance Managers

Records Supervisors

Records Clerks

Electronic Records Specialist



IG ORGANIZATION EXAMPLE

- Director of Information Governance (responsible for security)
- Senior Records and IG Manager
- Regional Records Managers



IG ORGANIZATION EXAMPLE

Director of [Records, Risk, Client Services, etc.]

- Information Governance is under scope, but not in title.
- Some have required JDs, others not
- report to different departments, but trend towards IT and Risk, which is telling!

Current IG Organization



Director of Information Governance



Asst. Director of Info. Gov.



Info. Gov. Technology Manager



Info. Gov. Compliance Attorney



Info. Gov. Business Process Manager



Sr. Manager - Info. Gov. Operations



IG Retention & Disposition Mngers



Record Retention & Disposition Team



Regional Records & IG Mng. Central/West



Electronic Records Crdntr.



Contracted Records Staff



Regional Records & IG Mng. East



Electronic Records Crdntr.



Contracted Records Staff



Regional Records & IG Mng. EME



Electronic Records Crdntr.



EME Records Staff



Regional Records & IG Mng. APAC



Lead Data Scientist



Data Scientist



WHAT'S THE CONSISTENT THREAD?

IG is built into the organizational culture.

- There is an understanding and acceptance that information must be managed throughout all parts of the lifecycle.
- Security of company and customer assets are at the forefront, and data is structured in a way so that it's protected from internal and external threats, and in compliance with regulatory requirements.
- Partnerships with all levels of the business (especially C-level) is critical for program success, and those with IG responsibility are looked upon to proactively provide suggestions/recommendations for improvement of data management as opposed to simply addressing a known need or request.
- The value of information is critical, and steps are taken to identify the more critical information through data analytics, disposition, and/or the elimination of ROT.

SO IG AS A CAREER
PATH...MISTAKE OR
SURPRISE?





IT MAY BE A MISTAKE IF...

- If you're staying rooted in traditional records management knowledge and not interested in learning about anything else.
- If you're not willing to have the difficult conversation.
- If you see AI and automation as a threat as opposed to an opportunity.
- If you have zero interest in security, technology, or analytics.
- If you don't want to interact with senior management.
- If innovation is a four-letter word.



IT MAY BE A SURPRISE IF...

- You're willing to think outside of the box in terms of responsibility ownership and job scope.
 - Privacy
 - Security
- You like taking on new challenges.
- You like working with new people.
- You like the chance to elevate or reenergize the importance of records management.
 - Records is not eliminated in IG, but becomes a spoke in a much larger wheel.

Records, records,
records...well, I know nothing
about it, but I'll do it, Boss!

SURPRISE



PATH TO IG CAREER SUCCESS



THE “BRAIN”

- Keep current on your industry
 - ARMA, AIEF, ILTA, IGI
 - Subscribe to industry news feed
- Keep current on world events as a means to sell your program
 - Regulatory changes – GDPR, CA Data Privacy
 - Security issues – who has gotten hacked, and how can you relate it back to your organization?
 - Weather – where have offices been closed or impacted by weather? DR/BC, remote access
- Consider getting certified
 - CRM
 - IGP
 - PMP
 - CISSP



THE “BRAIN”

- Take advantage of internal topics/classes/courses – even on applications that aren’t designed for your specific use
- Connect with internal/external colleagues.
 - Ask questions.
 - Offer input.
 - Learn and bring back ideas/suggestions/etc.

IG BRAIN EXAMPLES

ROT Analysis

Reclaim Storage Capacity and Mitigate Dark Data Risks

Data grows at a rate of 40-60% each year, but as capacity is expanded, redundant, obsolete and trivial user data - ROT - is clogging corporate networks resulting in unnecessary risk and expense. Depending on industry, 40-70% of this data has no business value. Harnessing ROT growth will not only control expenses by reducing or eliminate storage upgrades, but also minimize risk.

Live Webinar

Drafting Document Retention Policies

**IG for Executives 3-hour Online Crash Course
January 16, 2019 + FREE Book!**

data firm hit with first ever GDPR notice

I'm soliciting for insight from someone who has tasked their team with evaluating RIM Core Competencies. The competencies are understandably quite hefty - if you have used them, have you asked individuals to score themselves in a spreadsheet, or is there some other tool available to evaluate (that I am clearly missing)?

☆ Like ↗ Share



THE “HEART”

- Be passionate about governance, and/or the benefits of governance.
 - Costs
 - Risks
 - Compliance
 - Efficiency
 - Optimization
- “Sell,” not “tell.”
 - Identifying pain points and resolving them.
- Social networking

IG HEART EXAMPLES

- Cost reduction
- Risk Mitigation
- Successful Audits
- Innovation

I'm happy to report that we have reduced our storage costs by 25 percent this year, which is the equivalent of

Thank you! I did a search and found it pretty quickly. The client was thrilled to get a response in what they thought was "record time!"

We just heard back, and I'm happy to report there were no findings in our Q3 security audit!

Not sure if you saw this, but I'm thankful it wasn't us. Maybe we can send out a message to remind people of the importance of...



THE “COURAGE”

- Volunteer
- Present at meetings – the more, the better.
- Knock on the door and introduce yourself.
- Take a leadership role.
 - Professional organizations
 - Task forces
 - Projects
- Raise the alarm.
- Embrace technology and innovation.



IG COURAGE EXAMPLES

- Volunteer to lead a task force or team at work – or offer to create one if the need exists!
- Offer to work on projects or provide assistance even if the responsibility is typically not yours.
- Serve on a board – or a few boards!

There's no data like structured data. There's no data like structured data...







THANK YOU!